

User Guide:

How to create a quote and bind a policy.

1

Enter your username and password.

NB: Your username will be the email associated with your account.

Insurance broking process.

To register for access please [Click Here](#)

Portal Secure Login

Please enter your username and password. Your username is normally your email address.

Username

Password

[Forgotten Password](#)

Login

- 2 To create a new quote, click on the relevant product offering.

Dashboard Create, view, manage and transact quote or policy

Create a new quote

Click the product you require from the links below to create a new quote.

Motor Vehicle

Note: Dawes Comprehensive Motor product caters for prestige, high performance, exotic, classic, and vintage and veteran vehicles.



Motorcycle

Note: Dawes does not insure unregistered Dirt Bikes or any cover whilst used off-road.



Recent quote or policy

Retrieve existing quotes

- 3 Once read & understood, click "I have read and understood the Duty of Disclosure" and click "Next"

Calculate Terms

Copy Quote

Lapse Quote

Abandon Quote

Duplicate

Quit

If our information or questions are unclear, please contact I

Some Special Conditions

The policy you are applying for contains some special conc Statement (PDS). We strongly recommend that you read th conditions of the contract of insurance. All questions must fully answer any question, please use the 'Additional inform unsure how to answer any questions you can contact the I



I have read and understood the Duty of Disclosure

4

The term start & end dates will default to today's date. Once the quote is generated these dates will grey out. If they need to be changed before binding cover, you will need to "Copy Quote" and edit them.

Disclosure Details

Policy & Insured Details

Policy Details

Client Details

Insured Details

Drivers

Vehicles

Premium

Communications

Policy Details

Term Start

Term End

Original Inception Date

15/01/2024

15/01/2025

15/01/2024

Account

Zetland (ZU0001)

Intermediary

Broker Name

Broker Email

Broker2 Broker

noreply@broker.com

5

If doing a Motor Vehicle quote, select your "Product Variation/Cover Type."

Term End

Original Inception Date

15/01/2025

15/01/2024

Product Variation

Broker Email

Broker Phone

noreply@broker.com

0212345678

ker?

6

You will need to create a profile for your client (or link an existing profile) before you can proceed. To do, click on "Link Party".

The screenshot shows the 'Client Details' section of the Simplafy Connect interface. On the left, there is a sidebar with a menu containing 'Attachments', 'Policy Documents', 'Documents', 'Clauses', and 'Policy History'. Below the menu are buttons for 'Save Progress', 'Calculate Terms', 'Copy Quote', 'Lapse Quote', 'Abandon Quote', and 'Duplicate'. The main content area has a header with two questions: 'Are you the holding broker?' and 'Do you have a Letter of Authority?'. Below these are 'Yes' and 'No' buttons. The 'Link Party' button is highlighted with an orange circle. Below the button is a table with columns 'Party Number', 'Party Summary', and 'Role'. The table is currently empty, showing 'No data available.' Below the table is the 'Insured Details' section.

7

If searching for an existing profile enter the name and click "Search".
If creating a new profile, click on "Create Global Party" and enter the details.

The screenshot shows the 'Link Party' modal window. The modal has a dark blue header with the title 'Link Party'. Below the header is a 'Party Details' section with a text input field and a 'Search' button. Below this is a 'Party Summary' section, which is currently empty, showing 'No data available.' At the bottom of the modal are three buttons: 'Cancel', 'OK', and 'Create Global Party'. The background shows the same interface as the previous screenshot, but it is faded out.

- 8 Select an existing profile by clicking on the result.

Policy No.
MOVPOL11000175

Quote Ref.
MOVQTE10

Attachments

Policy Documents

Documents

Clauses

Policy History

Save Progress

Calculate Terms

Copy Quote

Lapse Quote

Link Party

Party Details

Search

Party Summary

John Test

Party Role

Description

- 9 Select the insured entity type (Individual or Company) and fill in the "First Name, Surname" or "Company" fields. Then click "Next"

Calculate Terms

Copy Quote

Lapse Quote

Abandon Quote

Duplicate

Quit

Party Number	Party Summary	Role
CLIENT000000049	John Test	Insured

Insured Details

Insured Type

Name of Holding Underwriter

< Previous

- 10** To add a driver, simply click "Add Driver".

Disclosure Details

Policy & Insured Details ^

Policy Details

Client Details

Insured Details

Drivers

Vehicles

Premium

Communications ^

Comments

Attachments

List of Drivers

Driver Name	Age
No data available.	

+ Add Driver

< Previous

- 11** Complete all the disclosure questions on the Driver Details tab.
NB: Please ensure full names are entered, no initials will be accepted.

Disclosure D

Policy & Insu

Policy Deta

Client Deta

Insured De

Drivers

Vehicles

Premium

Communicat

First Name

John

Surname

Test

Date Of Birth

21/01/1980

Age

Licence Issued

Australia / New Zealand

Other / International

Driver Imposed Excess

AUD \$ 000,000.00

Reason

In the last 5 years, has this driver:

Had a motor accident, claim (regardless of fault) or

12

To add more drivers simply click on "Add Driver" and repeat the process as many times as you want.

Click "Next" once all drivers have been added.

Disclosure Details

Policy & Insured Details ^
Policy Details
Client Details
Insured Details

Drivers ^
John Test

Vehicles

Premium

Communications ^
Comments

List of Drivers

Driver Name	Age
John Test	43

+ Add Driver

< Previous

13

To add a vehicle, simply click "Add Vehicle".

Disclosure Details

Policy & Insured Details ^
Policy Details
Client Details
Insured Details

Drivers ^
John Test

Vehicles

Premium

Communications ^
Comments

List of Vehicles

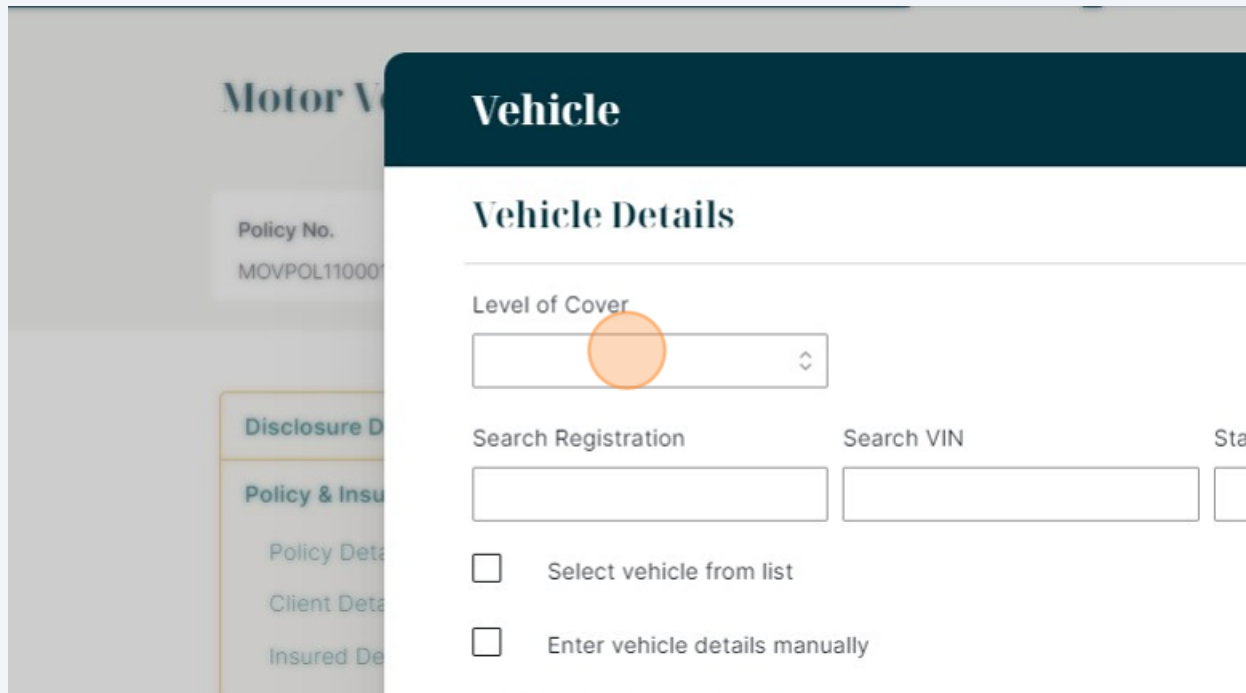
Vehicle Label	Make
No data available.	

+ Add Vehicle

< Previous

14 Select your Level of Cover - Comprehensive or Storage/Restoration.

NB: Please refer to our PDS regarding conditions of cover under these options.



Motor Vehicle

Policy No.
MOVPOL110001

Vehicle

Vehicle Details

Level of Cover

Search Registration

Search VIN

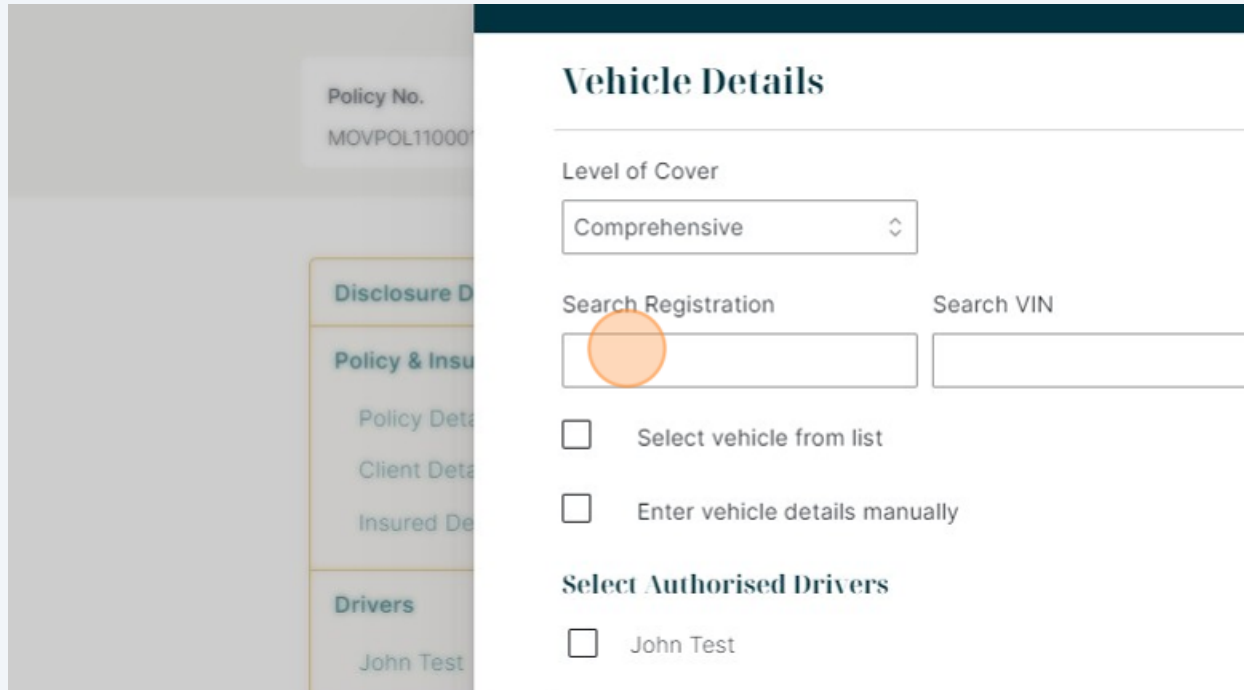
Search State

☐ Select vehicle from list

☐ Enter vehicle details manually

15 To search for a vehicle you can do so 3 ways.

1. Rego Search by entering vehicle registration then selecting the registration State.
2. By selecting the vehicle from available list options.
3. By entering the vehicle manually if no valid Rego search, or vehicle cannot be found in the dropdown list. NB: All manually entered vehicles will refer.



Vehicle Details

Level of Cover
Comprehensive

Search Registration Search VIN

☐ Select vehicle from list

☐ Enter vehicle details manually

Select Authorised Drivers

☐ John Test

16

You will need to ensure that you select the vehicle from the search results, even if there is only one vehicle showing.

Policy No.
MOVPOL110001

Variant
20i LUXURY LINE

Registration
REGONUM

VIN

State
NSW

Select vehicle

2021 BMW 3 8ASS 4D SEDAN TDFI T4 20i LUXURY LINE G20

2021 BMW 3 8ASS 4D SEDAN TDFI T4 20i LUXURY LINE G20

Select Authorised Drivers

☐ John Test

17

Select the drivers who will be driving, and need to be covered, for this vehicle.

Policy No.
MOVPOL110001

Select vehicle

2021 BMW 3 8ASS 4D SEDAN TDFI T4 20i LUXURY LINE G20

2021 BMW 3 8ASS 4D SEDAN TDFI T4 20i LUXURY LINE G20

Select Authorised Drivers

☒ John Test

Usage

Type of use

Private Business

Average 1

- 18 Proceed to complete the remaining vehicle disclosure questions relating to Usage, Values, Modifications/Accessories, Condition, Finance. etc.

Vehicle

Usage

Type of use

Private Business

Average frequency of use

Parking

Overnight parking address

☐ Can't find address

- 19 Type in the overnight parking address for this vehicle, it will produce results as you type.

Type of use

Private Business

Average frequency of use

Daily non-commuting

Parking

Overnight parking address

100 Bathurst Street, Sydney NSW 2000

100 Bathurst Street, Sydney NSW 2000

100 Bathurst Street, Condobolin NSW 2877

100 Bathurst Street, Brewarrina NSW 2839

100 Bathurst Street, Abermain NSW 2326

L 1 100 Bathurst Street, Sydney NSW 2000

L 2 100 Bathurst Street, Sydney NSW 2000

L 3 100 Bathurst Street, Sydney NSW 2000

20 The basic excess for this vehicle will show at the bottom of this tab.

If you wish to add a voluntary excess to reduce the premium, you can do so here on each vehicle tab. It will recalculate on the Premium screen.

Click "OK" once all questions have been answered.

- Prescribed Age 25 Clause

is

Excess

\$ \$1,000

Additional Voluntary Excess

⬆

ed Excess Amount

\$ 000,000.00

ed Excess - Description

\$0

\$500

\$750

\$1,000

Next

21

To add more vehicles simply click on "Add Vehicle" and repeat the process as many times as you want.

Click "Next" once all vehicles have been added.

22

If all details entered are acceptable by the system it will produce an auto quote for you, displaying the individual premium splits per vehicle (inc all charges).

23

Click the "Commission Rate Requested" field. If you wish to adjust your commission level simply enter the desired percentage and the system will recalculate accordingly.

The "Commission Rate Applied" field will show you what is applicable on this policy.

NB: You are only able to enter a value between 0% and your standard commission rate. No higher.

The screenshot displays the 'Vehicle Summary' section of the Simplafy Connect interface. It includes a table with various fees and a section for commission rates. The 'Commission Rate Requested' field is highlighted with an orange circle.

Vehicle Summary	\$1,431.23	\$21.47	\$145.27	\$79.90	\$1,677.87	\$0.00	\$0.00
Agency Fee	\$150.00		\$15.00		\$165.00		

Underwriter Agency Fee Override

Standard Commission Rate: 10.0%

Commission Rate Requested: 0.0%

Commission Rate Applied: 0.0%

< Previous

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	ESL	GST	Stamp Duty	Total Premium	Comm.	Comm. GST	Amount Payable
1.23	\$21.47	\$160.27	\$79.90	\$1,842.87	\$0.00	\$0.00	\$1,842.87
1.23	\$21.47	\$145.27	\$79.90	\$1,677.87	\$0.00	\$0.00	\$1,677.87
00		\$15.00		\$165.00			\$165.00

Override

Commission Rate Requested Commission Rate Applied

25

If you need to refer your quote to an Underwriter you can do so by clicking on "Submit Referral".

We recommend adding a Comment before doing so to assist the underwriter with your request. Refer next images.

Previous

Save Progress

Calculate Terms

Copy Quote

Lapse Quote

Abandon Quote

Bind & Close

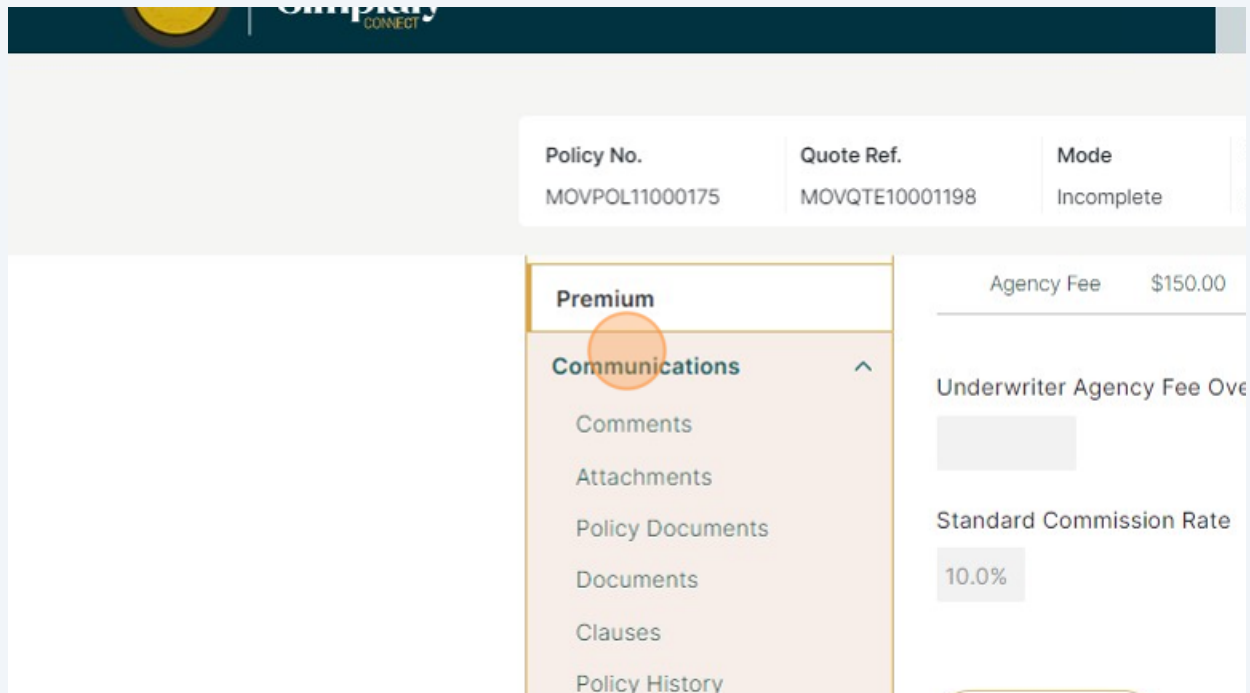
Submit Referral

Generate Offer

Duplicate

Quit

26 Click "Communications"



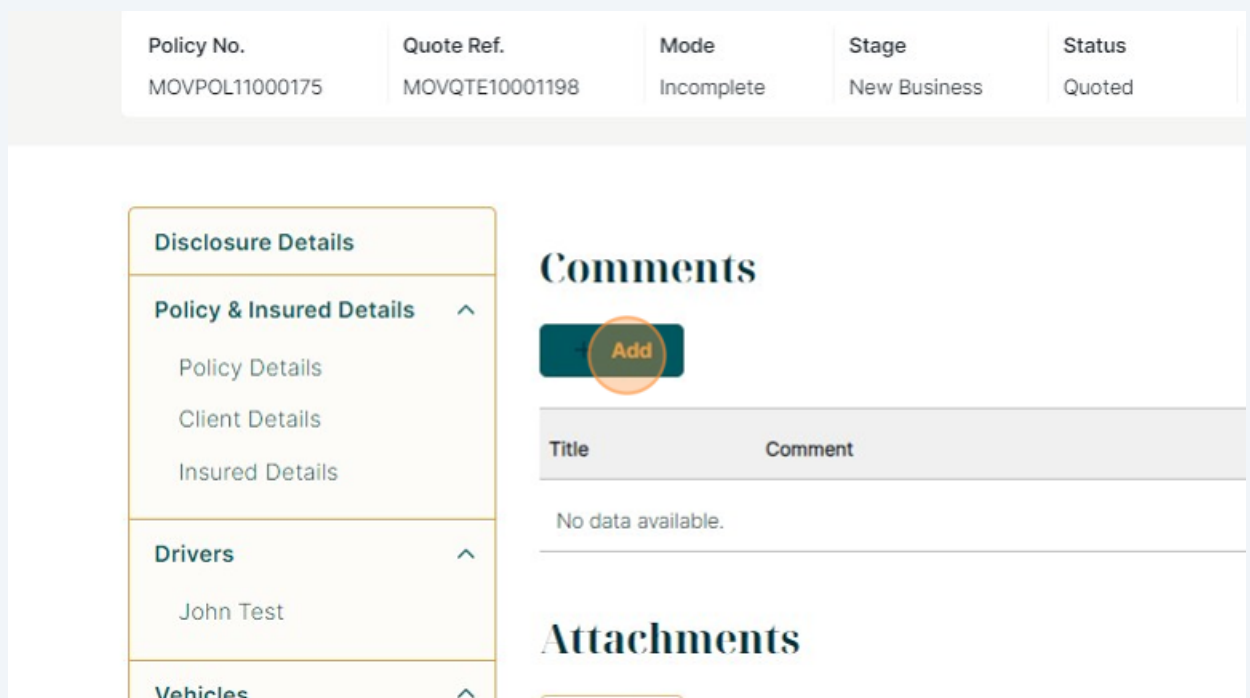
The screenshot shows the Simplify Connect interface. At the top, there is a header with the Simplify Connect logo. Below the header, there is a table with the following data:

Policy No.	Quote Ref.	Mode
MOVPOL11000175	MOVQTE10001198	Incomplete

Below the table, there is a sidebar with a menu. The menu items are: Premium, Communications (highlighted with an orange circle), Comments, Attachments, Policy Documents, Documents, Clauses, and Policy History. To the right of the sidebar, there is a form with the following fields:

- Agency Fee: \$150.00
- Underwriter Agency Fee Over: [Input field]
- Standard Commission Rate: 10.0%

27 To add a Comment, simply click "Add" and enter your text.



The screenshot shows the Simplify Connect interface. At the top, there is a header with the Simplify Connect logo. Below the header, there is a table with the following data:

Policy No.	Quote Ref.	Mode	Stage	Status
MOVPOL11000175	MOVQTE10001198	Incomplete	New Business	Quoted

Below the table, there is a sidebar with a menu. The menu items are: Disclosure Details, Policy & Insured Details (expanded), Drivers, and Vehicles. The 'Policy & Insured Details' section is expanded, showing the following sub-items: Policy Details, Client Details, and Insured Details. To the right of the sidebar, there is a form with the following sections:

- Comments**: A section with an 'Add' button (highlighted with an orange circle) and a table with the following columns: Title and Comment. The table is currently empty, with the text 'No data available.' displayed below it.
- Attachments**: A section with a table for adding attachments.

28

To add an attachment such as a purchase invoice or photos of a vehicle, simply click "Add" and select the file (one by one) to upload.

Policy Details

Client Details

Insured Details

Drivers ^

John Test

Vehicles ^

2021 BMW 3 4D SE ...

Premium

Communications ^

Comments

Attachments

Title	Comment
No data available.	

Attachments

Add

Description	File Name
No data available.	

Policy Documents

29

To view the Clauses (or Endorsements) applicable to this quote/policy, simply click "View".

These Clauses range from minimum driver age requirements to overnight parking conditions, plus any system or underwriter imposed Clauses.

Policy No.	Quote Ref.	Mode	Stage	Status	Id
MOVPOL11000175	MOVQTE10001198	Incomplete	New Business	Quoted	15

[Bind & Close](#)
[Submit Referral](#)
[Generate Offer](#)
[Duplicate](#)
[Quit](#)

No data available.

Clauses

[View](#)

Attached To	Title
Policy	Overnight
Policy	Prescription

30

If no referral is required or once formally Approved, to produce a Quotation Summary document you will need to select "Generate Offer".

NB: Doing so grey's out all questions on the quote.

[Copy Quote](#)
[Lapse Quote](#)
[Abandon Quote](#)
[Bind & Close](#)
[Submit Referral](#)
[Generate Offer](#)
[Duplicate](#)
[Quit](#)

Documents

Description	F
No data available.	

Clauses

[View](#)

Attached To
Policy

31

To view & download your Quotation Summary, simply go to the Documents screen and click on the .pdf to download.

The screenshot shows a user interface with a sidebar menu on the left and a main content area on the right. The sidebar menu has a 'Premium' section and a 'Communications' section. The 'Communications' section is expanded, showing a list of items: 'Comments', 'Attachments', 'Policy Documents', 'Documents', 'Clauses', and 'Policy History'. The 'Documents' item is highlighted with an orange circle. The main content area shows a 'Premium' section and a 'Communications' section. The 'Communications' section has a list of items, including 'Documents', which is also highlighted with an orange circle. The main content area also shows a 'Some Special Conditions' section.

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Dawes Motor Vehicle TMD

Documents

Description	File Name	Date Added
Motor Vehicle New Business Quotation	Motor Vehicle New Business Quotation (MOVPOL11000175).pdf	15/01/2024 11:08 am

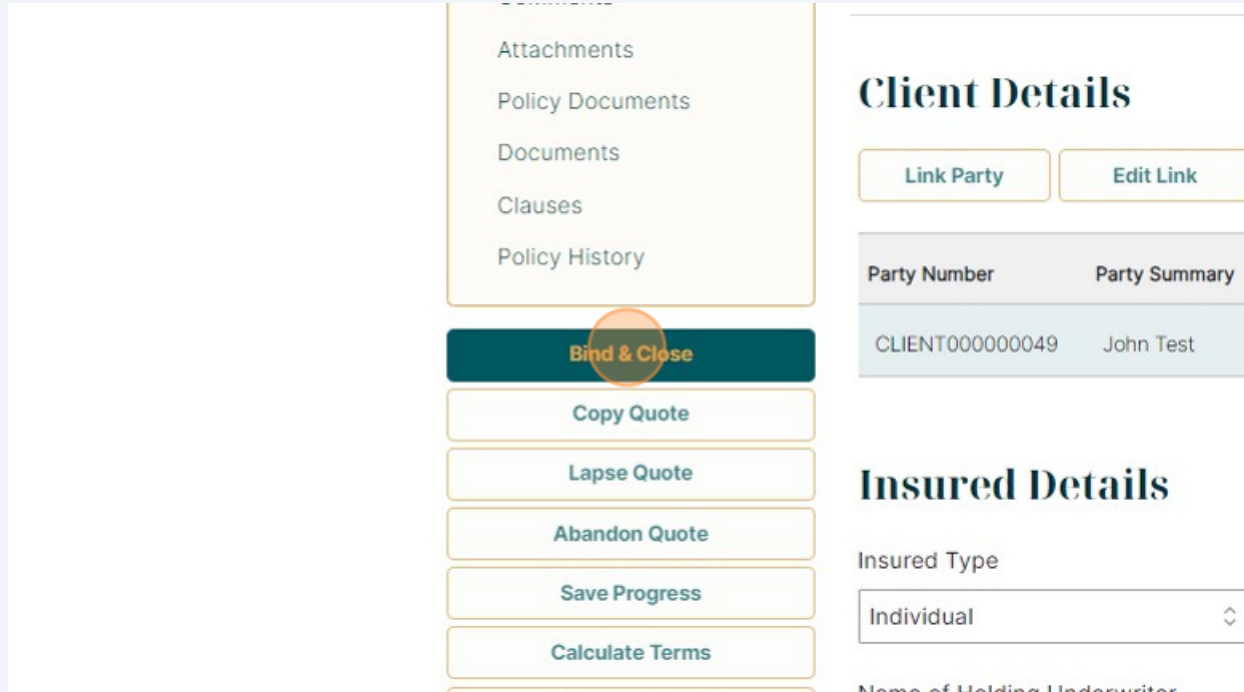
Clauses

[View](#)

Attached To	Title	Code
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33

Once you're ready to bind cover (remembering the Term State & End Dates have been greyed out with the original quote dates, along with all other fields), simply click on "Bind & Close."



Attachments

Policy Documents

Documents

Clauses

Policy History

Bind & Close

Copy Quote

Lapse Quote

Abandon Quote

Save Progress

Calculate Terms

Client Details

Link Party

Edit Link

Party Number	Party Summary
CLIENT000000049	John Test

Insured Details

Insured Type

Individual

Name of Holding Underwriter

34

If, prior to binding cover you need to update any details **including the policy start & end dates** you will need to click on "Copy Quote". This produces an unlocked editable duplicate version of your quote.

NB: You can click on "Copy Quote" as many times as you like to create multiple versions, but **only one** of these quotes can be bound and closed.

The screenshot shows a sidebar menu with options: Policy Documents, Documents, Clauses, and Policy History. Below these are buttons: Bind & Close, Copy Quote (highlighted with an orange circle), Lapse Quote, Abandon Quote, Duplicate, and Quit. To the right, there are sections for 'Client Details' with 'Link Party' and 'Edit Link' buttons, and a table with 'Party Number' and 'Party Summary' columns. The table contains one row: CLIENT000000049 and John Test. Below this is the 'Insured Details' section with 'Insured Type' set to 'Individual' and 'Name of Holding Underwriter' set to 'Swan'.

35

If you have clicked on "Copy Quote" you will see that all the question fields can now be edited.

Proceed to update quote details as needed, including the Start & End dates.

The screenshot shows a table with columns: Policy Number, Quote Number, Status, Stage, and Action. The first row contains: MOVPOL11000175, MOVQTE10001199, Incomplete, New Business, and Draft. Below the table is the 'Policy Details' form. On the left is a sidebar menu with 'Disclosure Details' (expanded) and 'Policy & Insured Details' (expanded). Under 'Policy & Insured Details' are 'Policy Details', 'Client Details', and 'Insured Details'. Under 'Disclosure Details' are 'Drivers' (with 'John Test') and 'Vehicles'. The 'Policy Details' section has fields for 'Term Start' (15/01/2024, highlighted with an orange circle), 'Term End' (15/01/2025), and 'Original Inception Date' (15/01/2024). Below these is an 'Account' field with 'Zeehan (ZU0002)'. The 'Intermediary' section has 'Broker Name' and 'Broker Email' fields.

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Click on "Calculate Terms" so the system can recalculate the quote terms for you taking into account any & all changes you have made.

The screenshot shows a sidebar menu on the left with the following items: Policy History, Copy Quote, Lapse Quote, Abandon Quote, Save Progress, **Calculate Terms** (highlighted with an orange circle), Duplicate, and Quit. The main content area on the right includes a table with Party Number and Party Summary, showing CLIENT000000049 and John Test. Below this is the 'Insured Details' section with dropdown menus for Insured Type (set to Individual) and Name of Holding Underwriter (set to Swan). A 'Previous' button is at the bottom right.

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Once you're ready to bind cover (remembering the Term State & End Dates have been greyed out with the original quote dates, along with all other fields), simply click on "Bind & Close."

The screenshot shows the sidebar menu with Attachments, Policy Documents, Documents, Clauses, Policy History, **Bind & Close** (highlighted with an orange circle), Copy Quote, Lapse Quote, Abandon Quote, Save Progress, and Calculate Terms. The main content area on the right includes the 'Client Details' section with 'Link Party' and 'Edit Link' buttons, and a table with Party Number and Party Summary, showing CLIENT000000049 and John Test. Below this is the 'Insured Details' section with a dropdown menu for Insured Type (set to Individual). The 'Name of Holding Underwriter' field is partially visible at the bottom.

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Click "OK".

To download the New Business schedule & the Certificate of Currency, simply go to the "Documents" screen under Communications, click on & download the files accordingly.

